

# **Wisconsin Public Library Standards**

**Fourth Edition**

**Endorsed by  
The Wisconsin Association of Public Libraries  
The Wisconsin Library Trustees Association  
The Council on Library and Network Development**



Wisconsin Department of Public Instruction  
Madison, Wisconsin

Additional copies of this publication are available at:

<http://dpi.wi.gov/pld/standard.html>  
or from the

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P.O. Box 7841  
Madison, Wisconsin 53707-7841

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November 2005

Bulletin No. 06075

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First edition 1987. Second edition 1994. Third edition 2000. Fourth edition 2005.

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# Foreword

Libraries are fundamental to education, and the public library is a key component of a vibrant culture, a healthy economy, and a strong democracy. All of you who work in public libraries, or in support of them, contribute to the strength and vitality of our communities. Collaboration among libraries and library systems helps to provide richer resources and enhanced service to all Wisconsin residents.

The fourth edition of *Wisconsin Public Library Standards* serves as an essential tool to evaluate current services and plan effectively for the future. These voluntary standards will help us meet the ever-changing needs of our communities. Through the hard work of our public library staff, we are building a stronger community and a brighter future for everyone who uses a Wisconsin public library.

Elizabeth Burmaster  
State Superintendent of Public Instruction



# Acknowledgments

The fourth edition of the Wisconsin Public Library Standards has been prepared by members of Wisconsin Division for Libraries, Technology, and Community Learning's Public Library Development Team, including Director Mike Cross, Consultants John DeBacher and Al Zimmerman, and Program Assistant George W. Hall.

The Fourth Edition builds upon previous editions, including the work of the Task Force resulting in the Third Edition in 2000. Task Force members included Doug Baker, Mary Bethke, Bob Bocher, Joy Botts, Sharon Charles, Mike Cross (Task Force Chair), Anders C. Dahlgren, Carol Gibson, Nancy Hunt, Pamela Nyberg Kiesner, Pat Laughlin, Ruth Ann Montgomery, Larry T. Nix, Karen Peterson, David Polodna, Jane Roeber, John Thompson, Neil Trilling, and Jim Trojanowski.



# Introduction

The 2005 edition of the *Wisconsin Public Library Standards* revises and updates the work of the many people who developed earlier editions of the *Standards*. We reviewed the previous edition of the *Standards*, noted the increased levels of library compliance with the earlier standards, and compiled information on changes in library statistical information in Wisconsin libraries since the last edition was produced.

The *Wisconsin Public Library Standards* document has evolved gradually over the years. Many of the standards in this document are unchanged from the earlier editions. However, since the public library environment has changed significantly, this edition updates quite a number of the technology-related standards.

The development of this document was guided by the belief that Wisconsin's public libraries play a critical role in providing free access to knowledge, information, and diversity of ideas to all residents of the state. It is because of the critical importance of public libraries that these standards are established. All Wisconsin residents need and deserve at least a basic level of library service. These standards provide a way to measure a *basic* level of quality for public library service and also provide a pathway to *excellence* in library service.

Thanks to advances in technology and the cooperation of all types of libraries, and statewide access to resources such as BadgerLink, even the smallest library can offer access to an impressive array of digital and traditional information resources. But while this new environment presents great opportunities, it also presents significant challenges. Today's library staff must master not only the skills and knowledge necessary to provide traditional library services, but also the new and constantly changing skills and knowledge required to utilize the latest in information technologies. Our library customers have come to expect rapid access to a broad range of services, from high-speed Internet, to electronic books, to comfortable settings and displays of inviting materials. Challenges also face the trustees and other government officials responsible for securing the funding and other resources necessary to provide library service that meets current needs and expectations.

This edition of the *Standards* reflects these changes and challenges. Some have been adjusted to reflect new and increased demands. Others reflect changes in public expectations for services.

Of course, planning must be done in context, considering current use, local and regional situations and projections, as well the availability and deployment of technology. Quality service to the *entire* community is a public library's basic responsibility. Every community includes children, young adults, and adults; and each of these groups has needs that must be considered when developing local library service.

## Service to Children

Public libraries promote the development of pre-reading and reading skills. Children who develop reading skills at an early age gain an essential tool for succeeding in school as well as for learning throughout life. Libraries must have staff, services, resources, and facilities that promote reading and learning for children. Libraries also need resources and services that support parents and other adults who work with children.

## **Service to Young Adults**

Special efforts also are needed to serve young adults properly—those who are no longer children but not yet fully adult. Young adults have interests and abilities that require unique resources and services. Special resources, targeted services, and a welcoming atmosphere are required to serve this population adequately.

## **Service to Adults**

Adults have a wide range of interests and needs, and the library's resources and services must be varied to meet those needs adequately. Today's rapidly changing society and economy makes lifelong learning a necessity for most adults. Libraries must provide resources and services that support the needs of adults covering a wide range of issues—from the practical to the philosophical.

This *Standards* document attempts to cover the services, resources, and other requirements for basic library service that should be available to *all* residents of the state, including those who face physical, developmental, or other barriers to their use of public libraries. Wisconsin's public library standards are entirely voluntary, but every library is encouraged to strive to offer all local residents the highest level of service possible. It is hoped that this document will assist in the continued development of high quality library service throughout Wisconsin.

As in previous editions of the *Wisconsin Public Library Standards*, the new edition establishes certain quantitative standards for public libraries based on both the municipal and the service population of the library. Service populations in this edition are more accurate because they have been calculated based on each library's actual usage by county residents who do not live in a library municipality.

As in the last edition, quantitative standards are established at four levels of effort: basic, moderate, enhanced, and excellent. Local libraries can establish service targets by selecting the appropriate level of effort to apply to each standard, or use the levels to plan for progressive improvements over a period of time.

# 1 Imperatives for Planning

A business plan is essential for a successful enterprise. It allows a business to secure funding, target marketing, establish present and future activities, and gauge its success. The same is true for libraries. For the past generation or more, public libraries have been encouraged to plan for future service needs. The Public Library Association (PLA) and the American Library Association (ALA) have developed a succession of manuals and tools to help libraries assess the needs of their communities and chart a course for future development. Since the 1980's, Wisconsin's public library standards have recommended services, resources, and settings that should be available at local libraries across the state. The recommendations in the standards are not meant to stand by themselves, however; they are meant to complement a local planning effort crafted to identify service goals that will allow the library to respond to the unique needs of its community.

Planning for libraries is a process of perceiving the future of both the community and the library and setting a direction for library movement toward that future vision. Planning helps the staff and board understand the situation of their community, set priorities, and establish methods for achieving those priorities. The planning document provides a record of the decisions made during that process. The document also becomes a guide for decision making and action by staff and the board.

An effective analogy for this planning process is the planning of a vacation trip. When planning a trip, travelers know where they are starting from and where they would like to go. The itinerary can be determined—what will be seen, how to travel, when each activity will occur. At the end of the vacation, the travelers can answer the question, “Where did you go?” because a clear destination was specified. Further, if the destination is not reached, they can look back and determine where they diverged from the original itinerary. While this analogy may be an oversimplification, the key elements of planning are present: to determine the library's destination in the future, to decide what the library will do to get there, and to assess how well the library progressed toward that view of the future.

## The PLA Model

The Public Library Association has produced several publications emphasizing the necessity of local planning for effective library service.

Since the publication of *A Planning Process* in 1977, several revisions have been issued—*Planning and Role Setting for Public Libraries: A Manual of Options and Procedures* (McClure et al., 1987), *Planning for Results: A Public Library Transformation Process* (Himmel et al., 1998), and *The New Planning for Results: A Streamlined Approach* (Nelson, 2001). Each revision introduced new aspects to the recommended planning model.

*Planning and Role Setting* introduced the notion of role selection for the public library, defining eight representative role profiles that could be used by planners to describe the essential priorities of the library and guide the allocation of budget, staffing, and energies.

*Planning for Results*, among other changes, introduced the idea of “visioning”—a concise expression of what is envisioned for the community, or how the community will benefit from having a successful library. Previous planning models had been institution-centered, and this new

step in the process seeks to create a stronger connection between the library and its community. *Planning for Results* also recast the eight role profiles from the previous planning model into thirteen representative service responses. This change incorporated libraries' experience using the original roles and reflected the growing application of technology in the library environment.

In *The New Planning for Results*, Nelson presents a series of steps to prepare and implement the planning process. The process is shorter in the number of steps involved and in the time required to complete the process (approximately five months instead of nine). Her steps include approaches to prepare, imagine, design, build, communicate, and implement the plan, with guidelines for considering the various service approaches.

Wisconsin's standards emerge within this national context. The standards expressed in this document recommend a basic level of library service in many areas. However, Wisconsin libraries can benefit even further, by applying the planning methods and strategies derived from the PLA models. A local plan for library service offers the best means for evaluating a library's progress to date and setting targets for its future development. A written plan also provides benchmarks for evaluating the accomplishments of the library. Planning for library services at the local level has become a standard for excellence in public libraries.

## **The Planning Sequence**

Planning requires an ongoing, critical look at the current status of library service compared to what it should be in the future. It is a cyclical process of assessment, forecasting, goal-setting, implementation, and evaluation, leading back into a new phase of assessment, and so on. It is also a pragmatic activity that can be undertaken in a thorough fashion or in a more simplified, compressed manner, if limited resources or schedule impose constraints on the planning process. There are many approaches a library can take to planning, many strategies a library can apply. The main factor is the importance to create and follow a plan.

Planning, however, sometimes seems to be something more discussed than done. To many it remains an intensive, exhaustive, sometimes mysterious process, something foreign to the library's day-to-day activities. But it need not be so intimidating—virtually every library plans at some level. Preparing each year's budget involves some level of planning and forecasting. Presenting that budget to the council is one way of expressing where the library expects to go and what it plans to accomplish over the next year. The activities involved in budget-preparation can be incorporated into a larger planning process. A wider field of vision creates a deeper understanding of the community and the library, and that deeper understanding supports the efforts of board members, staff, and other library advocates as they seek to improve the quality of library service in the community.

Typically, any planning model asks four simple questions. PLA's planning models offer variations on these key questions. Still other planning models can be found, produced by other agencies, associations, and experts, which offer still more variations on these same questions. Most planning methodologies ask:

- Where are we?
- Where do we want to go?
- How do we get there?
- Are we getting there?

*Where are we?*

This initial question involves assessment of the current condition of the library. This is the data-gathering phase of a planning methodology. PLA's original planning process devoted a lot of time and energy to data gathering in an effort to create a clear and thorough understanding of the community and the library. In *Planning and Role Setting*, this step came to be called "looking around," a much less imposing task that suggested a range of activities to assemble information about the library and its community.

In this initial phase of a planning process, planners establish benchmarks to use in designating and attaining planned goals. Information is gathered about the community—census data, economic reports from the community planner or chamber of commerce, forecasts from a regional planning office, or projections from the school district. Information is gathered about the library—annual report data, user or community surveys, circulation system usage reports, and corresponding data from neighboring or peer libraries. Planners may examine larger societal trends that might have an impact on the services the library needs to provide. Finally, public input in the form of surveys or focus groups can be included. Planning committees often include stakeholders from designated constituencies in the community.

Planners also may utilize a technique often used in strategic planning efforts—listing and discussing Strengths, Weaknesses, Opportunities, and Threats in the library's internal and external environment (sometimes referred to as a SWOT analysis). After this analysis, planners can identify the crucial strategic issues for the library. Planners need to address these crucial issues when they develop library goals and objectives.

These standards constitute one tool that planners may apply in this phase of a planning process. By examining these checklists, planners can produce a snapshot of the current condition of the library and possible areas of needed improvement.

### *Where do we want to go?*

The second question involves forecasts and projections. The participants in the library's planning process define a planning horizon—two years, three years, five—and express in broad terms how the library should develop over that period. This phase corresponds to the steps in the PLA planning model that formulate a community vision and mission statement, identify the most suitable roles or service responses, and set goals for the library. Working from the baseline information assembled during the data gathering phase and public input, planners set the overall desired course for the library.

Again, the standards can be used as one tool to chart a course for the library as part of its larger planning process. A review of this document may highlight areas where the library does not meet the recommended standard, and that may become an area to address in the library's plan.

### *How do we get there?*

In response to this third question, planners craft an action plan. After visioning, selecting roles or service responses, and writing the mission statement, a library planning group sets service priorities. These are translated into written goals and objectives that describe the ends or targets desired by the library and indicate a direction in which the library should move. The library's objectives will be measurable or verifiable and are time-specific. They provide the basis for evaluating the library's progress. To aid libraries in setting measurable targets, *Output Measures for Public Libraries* (Van House et al., 1987) presents key measures of library service. *Measuring for Results: the Dimensions of Public Library Effectiveness* (Joseph R. Matthews, 2004) emphasizes ap-

proaches in assessing the library's outcomes—the economic and social impact or benefit that the library's services provide to the community.

Implementing the plan developed by the library's planning committee requires designing activities and detailing the strategies to carry them out. Writing the planning document is one visible result of the planning process. Dissemination of the library's plan includes presentations to public officials and at promotional activities. The plan becomes useful information in the political process of garnering resources to carry out the library's plan.

### *Are we getting there?*

Reviewing and recycling complete the planning cycle. Once it is adopted, the plan becomes a benchmark, a means of assessing whether the library is on course. Planners routinely and continually evaluate the degree to which the plan's activities have advanced the library's priorities, as expressed in its written objectives. This evaluation effort occurs in two ways. The first is a monitoring process, which goes on throughout the year to assure that the library is not unintentionally straying from the established priorities. Second, a more formal evaluation occurs at least annually to answer the question, "What progress was made by the library?" In each service and administrative area, the key question is, "What difference did the library make?" This evaluation step ultimately begins to answer the question, "Did community residents receive better service?"

Any evaluation also includes assessing the process used in developing the plan (including the costs), the impact of the planning process on service and staff, and the community's response to the plan. Questions raised may include, "Was the plan useful?" and, "Were the resources chosen appropriate?" This step allows the library to think about how it all worked. Revising the plan and the process in order to improve services is the end result of this step.

## **Local Choice and Planning**

There is no one, single, best way to plan. Differences in communities and libraries will—and should—be reflected in the process, the strategies and the techniques used by different libraries as well as in the final planning documents developed by different libraries. As the PLA planning model has evolved over the years, this flexibility of approach has become one of the hallmarks of the planning process.

In some communities it will be appropriate to undertake a thorough, rigorous process. The process may involve a large citizens' committee. The committee may undertake several surveys to gather information about the community. The committee may also conduct numerous interviews with representatives of various groups within the community. As a result of assembling this information, the committee may recommend a major revision to the library's mission statement and a long list of goals and objectives, all of which may be presented in a comprehensive report to the council and the community.

In other communities a more modest approach may be suitable. In such a community the library board and staff may determine there isn't the time, budget, or staffing to support a more elaborate process, or perhaps the library's previous plan emerged from a more exhaustive effort and the new plan is expected to be more of a course correction than a wholesale revision. In this instance, the planning committee might consist of board and staff only. Data gathering may be limited to existing data and reports readily at hand. The planning report may be a much simpler document.

An important key to planning for libraries is that an individual library can set its own pace for the process. The process incorporates this flexibility with the hope that all public libraries can plan

for improved library services that are appropriate for the communities they serve. No library is too small to plan, because each community deserves the good service that results from effective planning.

Determining who should facilitate the process is another consideration. On the one hand, a local community leader garners respect and can encourage the involvement of other key members of the community. The downside is that such people may have set opinions about the community or library that can impinge on their effectiveness. They also may not have the necessary skills to coordinate and carry out the planning process. Professional facilitators or consultants have advantages in that they have necessary training skills and experience to conduct the process, they generally are more neutral in their approach, and they can bring out important information from the group. On the other hand, they generally charge fees for their services and may not be aware of public library and community issues. Each library should consider the various factors to determine the appropriate person to facilitate the planning process.

The final written planning document is not the only product of the planning process. It is the process itself that also changes the library. Involving community residents and library staff in the planning effort helps to assure that the established goals are achievable and will be carried out. Lines of communication opened during the process can remain effective channels of communication for future community-based planning. Broad community participation in the library's planning effort tends to foster broad support for the library's goals and the continuing improvement of library service.



## 2 How to Use These Standards

A locally developed long-range plan for the library is the key to effective library service. A local planning effort can account for circumstances unique to the municipality or service area that cannot be anticipated from a statewide or a national perspective. The planning process described in the previous chapter and in other planning guides is a continuous process of assessment, review, and revision, “a series of approximations to a moving target.” (Robbins-Carter and Zweizig, 1985) These standards are meant to guide local libraries in Wisconsin to their own fruitful, locally focused planning efforts.

The standards offer a starting point that library boards and library directors can use to direct local long-range planning efforts. Specific standards are recommended in the areas of governance and administration (including planning, funding, and public relations); staffing; collections and resources; services; and access and facilities. By meeting these standards, a library establishes a baseline from which it can strive for excellence. A community considering the establishment of a new public library should assess its ability to meet these standards. If a library or a community cannot meet these standards, board and staff members should explore alternate means for delivering library service.

### Levels of Use

At the most basic level, a library can focus its attention on the checklists provided in chapters 3 through 7, noting whether or not it meets the recommended minimums. Each standard is presented as a simple statement; either a library meets the recommendation or it does not. The checklists are formatted to encourage a library to copy and use them separately. It is expected that every library should strive to meet, at a minimum, these basic recommendations. Libraries that exceed the basic recommendations should develop service goals based on local needs.

At a higher level of effort, a library can apply the standards in the context of a broader, locally based planning process. This process is discussed in Chapter 1. By engaging in a planning process, local planners can produce a plan of service designed to meet specific local needs. One of the standards in Chapter 3, in fact, requires that a library undertake a planning effort to assess local service needs. When accepted planning methods are conscientiously employed to develop service goals and a plan of action, the resulting goals will more accurately reflect the needs of the community. This is not meant to suggest that libraries that adopt a planning process should abandon these standards. In the context of a broader planning process, a library can use the checklists to gather information about itself and the community during the information-gathering phase of a planning process. The topics and issues addressed by these standards could be used as an outline for a local plan of service.

Appendix E provides a bibliography of sources to help guide local planners through a library planning process.

### Quantitative Measures

Like previous editions, this edition of the standards is a hybrid of sorts. On the one hand, this document gives support to contemporary thinking about the need to establish service goals for individual libraries at the local level. On the other hand, this document responds to an interest in

offering specific, prescriptive recommendations regarding key library service parameters for those local libraries that want to use such measures.

Selected standards include a quantitative recommendation for library service. Because they tend to be the convenient yardsticks by which libraries are often defined and described (“How large is the collection at XYZ library?” or “How many full-time equivalents [FTEs] are on staff?” and so on), these measures tend to take on a larger import than other standards. For that reason it is necessary to discuss the origins of these quantitative standards and their use. The quantitative standards included in this edition and the chapters in which they appear are shown in the chart below.

<b>Quantitative Standards by Chapter</b> (with standard # in parentheses)		
Chapter 3	.....	Director—hours per week (#17)
	.....	Total operating budget (#34)
Chapter 4	.....	FTE staff per 1,000 population (#7)
	.....	Staff continuing education hours per year (#8&9)
Chapter 5	.....	Volumes held per capita (print) (#16)
	.....	Periodicals titles per 1,000 population (print) (#17)
	.....	Audio recordings held per capita (#18)
	.....	Video recordings held per capita (#19)
	.....	Materials expenditures per capita (#20)
	.....	Total collection size per capita (#21)
Chapter 7	.....	Hours open (#8)
Appendix C	.....	Quantitative standards regardless of community size

Generally, the service targets recommended in these quantitative standards are drawn from the data assembled from the latest public library annual reports submitted to the Division for Libraries, Technology, and Community Learning (DLTCL). The Public Library Standards Task Force used this information, standards established in other states, and their collective professional judgment to establish the quantitative standards used in this edition. Standards are established for seven different population levels at four levels of effort: *basic*, *moderate*, *enhanced*, and *excellent*. These correspond with the actual 2004 Wisconsin Library Service Record data by population range at the 30th, 50th, 70th and 90th percentiles, adjusted for anomalies and outliers.

Local libraries can establish service targets by selecting the appropriate level of effort to apply to each standard. Libraries may also choose to use the four different levels to set a target of progressive improvement over time. For example, a library may plan to achieve the moderate level for “hours open” within two years and achieve the enhanced level within five years.

In addition to establishing per capita standards, the Public Library Standards Task Force also established a number of quantitative standards that apply regardless of community size. These standards are based on the judgment of the Public Library Standards Task Force that residents of any community need and deserve at least a basic level of library service. These standards are listed in Appendix C.

As with any statistical comparison, it is important to note the possibility of inconsistent data-gathering efforts, which can lead to invalid statistical comparisons. To help avoid the possibility of invalid comparisons, it is essential that all Wisconsin libraries utilize the definitions that are provided with the state annual report form (and also available on the Internet at <http://dpi.wi.gov/pld/annrpt.html>). Some of these definitions are also included in Appendix F.

Planners should also consider demographic and social factors that may affect the application of these quantitative standards in particular situations. For instance, the distribution of compact discs from the settlement of the music industry price fixing lawsuit in 2003 may have had a disproportionate affect on the standard for audio recordings per capita. At the same time, the growing trend to listen to music in MP3 or other digital formats may affect the demand for compact discs and instead increase demand for electronic resources. Librarians and planners should consider changes in the community and the library marketplace that may affect the quantitative standards published in this edition.

One additional note concerning quantitative standards: many factors that are very important in determining the quality of local library service are difficult to measure. The Public Library Standards Task Force urges library boards and staff to utilize the entire *Standards* document, not just the quantitative measures, when evaluating their library and planning for service improvements.

## **Service Population and Per Capita Standards**

Each of the quantitative standards offers recommendations that vary according to a library's service population. For these measures, a different service target is recommended for each of seven population categories.

### *Nonresident Borrowers*

It is crucial, before applying the per capita standards for every library in the state, to develop a meaningful and accurate estimate of the population it serves. In Wisconsin, estimating a library's service population is complicated by the fact that libraries provide service to many individuals who do not reside within the municipality that established the library. These "nonresident borrowers" include county residents who have access to the library as part of the county's plan for library service, residents of other municipalities within the same system area, and, in many cases, residents of other system areas. In almost all cases, a library's true service population is greater than its "official" municipal population.

### *Methods for Estimating Service Population*

It is recommended that a library employ one of the following methods for estimating its service population. Any of these methods will produce an estimate of the library's service population that is a truer reflection of its actual use patterns than the strict use of the municipal population. These methods will produce an estimate of the library's service population that can be used to apply the quantitative standards that appear in this document. Methods that allocate nonresident populations on any basis other than observed use of library collections and resources are subject to greater error. The DLTCL encourages all libraries to make an estimate of their extended service population as a point of reference for use of these standards and for other library planning purposes.

**Use the *Service Record* population.** Starting in 2000, the service population reported in the *Wisconsin Library Service Record* is based on each library's share of total circulation to county residents who do not live in a library community. For example, if the ABC Public Library accounts for 20 percent of the total circulation from libraries in the county to county residents who do not live in a library municipality, then 20 percent of the county nonresident population is allocated to the ABC Public Library. This number is then added to the library's municipal population to derive an estimate of the library's total service population. This estimate should, in most cases, be a more accurate estimate of service population than estimates used in previous *Service Record* edi-

tions. However, libraries with significant usage by residents of other library communities and/or residents of other counties may wish to use one of the alternative methods discussed below.

**Use systemwide nonresident usage data.** If nonresident use data is gathered on a systemwide basis in a multicounty system, an allocation of the system nonresident population can be made, based on the library's share of the total system circulation to nonresidents. This variation has the advantage of rendering county boundaries within the system invisible.

**Base estimates on local circulation patterns.** A library also can examine resident borrowing as a proportion of total circulation and extrapolate a rough, circulation-based estimate of its overall service population. If residents and nonresidents can be assumed to borrow material at roughly the same rate per capita, and residents account for 85 percent of the library's total circulation, then it can be said that residents also account for 85 percent of the total population. If the library's municipal population is divided by the proportion of circulation transactions that go to residents, the result will be an estimate of the library's total service population. For example, a library with 85 percent resident circulation, and a municipal population of 7,500 will have a service population of 8,824 ( $7,500 \div 0.85 = 8,824$ ).

**Add the population of surrounding unserved areas.** If, through the observation of nonresident use, the staff of a municipal library is aware that a majority of residents of an adjacent town or towns use the library, it may simply add the population of the town or towns to its municipal population.

### *Municipal Population*

In some cases, it may be more pragmatic to present the library's service population in terms of its municipal population. Sometimes—when presenting the library's budget to the municipality, for example—it may cloud the matter if the library claims a service population larger than its municipality. Common councils and village boards tend to focus their attention on the municipality, and many tend to classify themselves according to their municipal population. In this instance, the library may be able to press a clearer case for its needs if its arguments are based upon the municipal population. Therefore, as an extra point of reference and in addition to the service-population-based standards, this document provides an analysis of the quantitative measures based on the municipal populations of the state's public libraries (Appendix A). Each edition of the *Wisconsin Library Service Record* includes the official Wisconsin Department of Administration's annually updated population estimates for each library municipality.

Libraries are encouraged to produce plans for service based on their service population, instead of their municipal population. Consistency is crucial, however. If a library evaluates its services by applying its extended service population to the calculation of one of the quantitative standards, it should apply its extended service population to the calculation of all of the quantitative standards.

## **Quantitative Measures and Local Planning**

The notion of issuing quantitative standards may seem to run counter to the planning theme that service goals should be defined at the local level. Quantitative measures, however, are intended as a tool that libraries can use to help establish selected service goals. They are presented here with substantial flexibility in order to be configured by local planners to best reflect the local situation and local needs. As part of a local planning process, individual library boards and staff can establish service targets on the basic, moderate, enhanced, or excellent level of effort. Libraries also can establish a goal of moving from one level to a higher level over a period of time.

Libraries may wish to supplement use of the quantitative standards with peer comparisons to similarly-situated state and national libraries. Statewide statistics are available at <[http://dpi.wi.gov/pld/lib\\_stat.html](http://dpi.wi.gov/pld/lib_stat.html)>. The Public Library Association's annual *Public Library Data Service: Statistical Report* is one source for national data. Nationwide public library statistics also are available from the National Center for Education Statistics (NCES) through the Federal-State Cooperative System for public library data (FSCS). FSCS data are available at <<http://nces.ed.gov/surveys/libraries/Public.asp>>. The Public Library Peer Comparison Tool at this site (<http://nces.ed.gov/surveys/libraries/compare/Index.asp?LibraryType=Public>) allows the user to get information on a particular library, or to customize a peer group by selecting the key variables that are used to define it. The user can then view customized reports of the comparison between the library of interest and its peers, on a variety of variables selected by the user.

The standards checklists and the quantitative measures are an outgrowth of the simplest level of application of these standards. The standards encourage libraries to go beyond that most basic level of application to engage in a more thorough planning process. As a result of that planning process, board and staff understanding of the community will be enhanced. The standards can then be applied in a more informed manner, and libraries will be able to improve services to the community beyond the basic level presented in the standards.

The standards are intended as an aid to local planning, not as a substitute for, or a constraint on, local planning.

## **Quantitative Measures and Large Libraries**

Because there are relatively few large public libraries in the state (only four serve municipal populations of more than 100,000 and only twelve serve municipal populations of between 50,000 and 99,999), in-state comparisons of large institutions are limited. The standards provide analyses of quantitative measures for libraries of *all* sizes in the state. Results are reported for libraries in the population groups 50,000-99,999 and 100,000 and over, but because of the limited sample size in those categories, the results may not be as reliable as they are in other categories.

Larger libraries are strongly encouraged to supplement use of these standards with their own analyses of data drawn from peer institutions in other states in the Midwest and across the country. The Public Library Association's annual *Public Library Data Service: Statistical Report* is one source for such data. Nationwide public library statistics are also available through the Federal-State Cooperative System for public library data (FSCS). FSCS data are available at <<http://nces.ed.gov/surveys/libraries/Public.asp>>.

## **Services to Populations with Special Needs**

Persons with special needs include individuals of all ages who often face barriers to their use of public library services. These barriers may be physical, as in the case of persons with physical or developmental disabilities, those who are homebound or incarcerated or who live in residential care facilities. Barriers also can be psychological. For example, low income individuals may think that it costs money to join the library or fear incurring overdue fines. Other persons who may experience psychological barriers to their use of the public library are persons with mental illness, adult new readers, individuals from diverse cultural backgrounds, and new immigrants with limited English-speaking ability.

Because persons with special needs are seldom among the library's traditional patrons, often they are invisible members of the community. However, good planning will identify all the library's

potential constituencies, including individuals with special needs. The library can then develop specific strategies for reaching them and providing materials in formats they can utilize.

Two DPI publications, *Public Library Services for Youth with Special Needs: A Plan for Wisconsin*, and *Adults with Special Needs: A Resource and Planning Guide for Wisconsin's Public Libraries* are invaluable tools in assisting librarians to plan for adults and children, and their usefulness is not limited to special needs populations. The plans themselves are models for strategic planning; including visions, goals, and strategies, and their bibliographies are pertinent for patrons of all ages.

## **Services to Youth**

To ensure quality services for youth in Wisconsin, it is important that libraries of every size study the needs of children and young adults in their community and plan, fund, implement, and evaluate appropriate programs and services for them. These services should also include the parents, caregivers, and adults who work with youth.

As library directors, boards, and youth librarians seek to measure levels of service and to formulate plans, an indispensable publication to use in conjunction with these standards is *Wisconsin Public Library Youth Services Guidelines*, published by the Youth Services Section of the Wisconsin Library Association in 1995.

Evaluation of services can be aided with statistics about the youth population in the library's service area. For example, the total number of children and young adults within a service population can be compared to the number of them who are library card holders; the total number of young people can be compared to attendance at programs designed to attract various age groups. Such knowledge can impact on strategic planning for on-site activities and outreach services.

Information on numbers of children below age 18 by county is available in annual editions of *The WisKids Count Data Book* prepared by the Wisconsin Council on Children and Families, Inc., and The Institute for Research on Poverty, University of Wisconsin–Madison. Information on public school enrollment—by county, school district, school, ethnicity, and gender—is available annually from the Wisconsin Department of Public Instruction, Center for Education Statistics, which can also provide information on private school enrollment—by county, school district, school, and gender.

## **Branch Libraries**

Although the standards generally apply to an entire institution, they also are offered as one tool a board can use to evaluate individual branches in a multiple outlet service environment. However, certain functions are likely to be provided centrally, and standards relating to those functions will not apply to a branch. Application of the quantitative standards to branch libraries requires the development of service area population estimates for each branch library. DLTCL staff can assist with the development of these estimates.

# 3 Governance and Administration

Public libraries in Wisconsin must be governed and operated according to Chapter 43 of the *Wisconsin Statutes*. In addition, all public libraries operate most effectively if they follow sound practices of administration, management, planning, funding, and public relations. These important issues are covered in this chapter.

## Governance

Public library trustees are public officers and as such are legally responsible for the governance of the library and the conducting of its operations in accordance with local, state, and federal laws. Libraries should meet the following standards relating to governance:

Yes No

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Residents have free access to tax-supported public library services ( <i>Wis. Stats.</i> ss. 43.52(2) and 43.15(4)(c)).  |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. The library is established, and operates, in accordance with Chapter 43 of the <i>Wisconsin Statutes</i> .   |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. The library is in compliance with other Wisconsin laws that affect library operations, such as laws relating to open meetings ( <i>Wis. Stats.</i> ss. 19.81 to 19.98), ethics ( <i>Wis. Stats.</i> s. 19.59), and public records ( <i>Wis. Stats.</i> ss.19.31 to 19.39). |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. The library is in compliance with federal laws that affect library operations, such as the Americans with Disabilities Act and the Fair Labor Standards Act.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. A legally appointed and constituted library board governs the operation of the library ( <i>Wis. Stats.</i> s. 43.54 or s. 43.57).   |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. The library board has exclusive control of the expenditure of all monies collected, donated, or appropriated for the library fund ( <i>Wis. Stats.</i> s. 43.58(1)).   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. The library board hires the library director [ <i>Wis. Stats.</i> s. 43.58(4)] and delegates active management of the library to the library director.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. The library board conducts annual performance evaluations of the library director.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. The library board determines the library staff table of organization and the rates of compensation for library staff positions [ <i>Wis. Stats.</i> s. 43.58(4)].  |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. The library board has written bylaws that outline its purpose and its operational procedures and address conflict-of-interest issues. The bylaws are reviewed at least every three years.   |

**Yes    No**

- ☐ ☐ 11. The library board adopts written policies for operating the library and reviews them on a regular cycle, ensuring that all policies are reviewed at least every three years. The policies are consistent with state and federal laws, and with applicable court decisions. Policies are updated to reflect changes in applicable laws. Policies address services provided to children as well as adults, and cover the following issues (among others): circulation, code of conduct, collection and resource development, confidentiality of patron records, handling of gifts, meeting room use, personnel, programming, public notice bulletin board, public records, and use of electronic resources by staff and patrons.
- ☐ ☐ 12. The library board meets monthly (with the library director in attendance) at a time and in a physically accessible location convenient for the board and the community and in accordance with the state law on open meetings and the Americans with Disabilities Act.
- ☐ ☐ 13. The library provides support for the continuing education of its trustees, which includes payment for workshop registrations and library association dues.
- ☐ ☐ 14. The library board is invited to participate in the diversity and ability awareness training provided to staff.
- ☐ ☐ 15. The library is a member of a public library system and actively participates in its program of service, including reciprocal borrowers' privileges and interlibrary loan.
- ☐ ☐ 16. The library board enters into any necessary contractual agreements to participate in the public library system and in resource sharing with other types of libraries in its service area.

## **Administration**

Library administrators and staff use sound library administration and management practices to apply the policies and statutory obligations of the governing board to the daily operations of the library. Libraries should meet the following standards relating to administration:

**Yes    No**

- ☐ ☐ 17. The director is paid to perform library-board-designated duties for no fewer than 25 hours per week, which includes scheduled hours away from a public service desk.
- ☐ ☐ 18. The library director provides current library financial and statistical reports for review at each library board meeting.
- ☐ ☐ 19. The library director provides every new board member with a copy of the *Trustee Essentials* and participates in an orientation program for each new board member. (See Trustee Essential #27: Trustee Orientation and Continuing Education at <http://dpi.wi.gov/pld/te27.html> for more information.)
- ☐ ☐ 20. The library director informs the board of pending legislation on the local, state, and national levels that affects libraries and explains how the proposed legislation might affect local library service.

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 21. The library director is responsible for personnel administration, including hiring, supervising, evaluating and dismissing library employees.                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | 22. The library director is responsible for developing library operating procedures based on board policies.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. The library director monitors statutory changes and court decisions related to library operations, and recommends any policy changes needed to maintain legal library operations. |
| <input type="checkbox"/> | <input type="checkbox"/> | 24. The library director is actively involved in community planning efforts.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 25. The library director keeps the library board informed of library services and library programs and all important issues facing the library.                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | 26. The library collects the statistics and information required by the DLTCL and reports that information to the municipal governing body, the library system, and the DLTCL.        |

## Planning

Library trustees and staff have a continuing obligation to assess the changing service needs of the community. Conscientious planning will help the library in its efforts to anticipate and respond to the community's library needs. Libraries should meet the following standards relating to planning:

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 27. With input from the community, the library board and staff develop and write a long-range plan that covers the next three to five years.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 28. The long-range plan contains a mission statement that describes the purpose and priorities of the library in the community.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 29. The long-range plan includes goals and specific, measurable objectives, with a timetable for implementation.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 30. The long-range plan is reviewed and updated annually by the library board. An evaluation of the library's progress toward meeting the plan's goals, objectives, and timetable should be included in this review. |
| <input type="checkbox"/> | <input type="checkbox"/> | 31. As part of the library's long-range planning efforts, a systematic community study is conducted over a multiyear planning cycle.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 32. The library participates in system-level planning and county-level planning for library services.  |

## Funding

One key responsibility of the library board is to seek and secure sufficient funding (from public and private sources, as appropriate) to support the local service goals of the library. Libraries should meet the following standards relating to funding:

**Yes    No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 33. The public library is adequately supported by municipal (or county) funds on an on-going basis; grants and donations supplement, but do not supplant, the basic funding structure of the library.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 34. The library receives sufficient financial support from the community to provide a level of library service consistent with its long-range plan of service, statutory maintenance of effort requirements, and the standards in this document. In addition, the minimum total operating budget is \$60,000 in 2005. See Appendix C for further information regarding this standard, including minimum total operating budgets for years 2006 to 2010. |
| <input type="checkbox"/> | <input type="checkbox"/> | 35. The library follows fiscal procedures consistent with state law, library policy, audit requirements, and local government requirements in preparing, presenting, and administering its budget.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 36. The library director prepares and the library board reviews and adopts an annual budget proposal that accurately reflects the needs of the library and the community it serves.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 37. The library director and staff maintain awareness of available grant and other outside funding sources.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 38. The library board and the library director present the proposed budget to their municipality. Additional presentations are made to other governing bodies as appropriate.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 39. The library board reviews and approves bills presented for payment at each library board meeting, in accordance with <i>Wis. Stats.</i> s. 43.58(2) and the Prompt Payment Law ( <i>Wis. Stats.</i> s. 66.285). All payments from public funds are made by the appropriate municipal or county official.  |

## Public Relations

Library public relations is a coordinated effort to communicate a positive image of the library and promote the availability of the library's materials, services, and programs. Libraries should meet the following standards relating to public relations:

**Yes    No**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 40. All library staff members exhibit a positive and helpful attitude.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 41. The library's annual plan includes activities designed specifically to enhance the library's public relations. |
| <input type="checkbox"/> | <input type="checkbox"/> | 42. The library's annual budget allocates funds for public relations activities.                                   |

**Yes**   **No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 43. The library ensures the highest quality of all informational, directional, and promotional material, using in-house, system, or commercial printing capabilities.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 44. Library policies are developed, reviewed, and revised with consideration given to their effect on the library's public relations.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 45. Annually, the library implements a number of generally accepted publicity techniques; the choice of which techniques to employ will be based on the characteristics of the community, including the needs of persons with disabilities, adult new readers, and those with limited English-speaking ability.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 46. The library uses nonprint media (such as the Internet, cable TV and radio) and accessible formats (such as large print, audiotapes, and translations into other languages) to promote its programs to persons with disabilities, adult new readers, and to people using English as a second language.         |
| <input type="checkbox"/> | <input type="checkbox"/> | 47. The library cooperates in systemwide and statewide efforts to promote library services.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 48. The library designates a staff member to coordinate public relations activities within the library and between the library and other local agencies.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 49. The library ensures that staff maintain contact with schools, community organizations, businesses, and other agencies within the library's service area.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 50. The library develops specific strategies to inform patrons with disabilities, non-English-speaking patrons, and adult new readers of its materials, programs, and services, including dissemination of publicity materials in alternate formats, in languages other than English, and using basic vocabulary. |



## 4 Staffing for Public Libraries

Each public library must have a regular, paid, qualified staff of one or more persons, including a properly certified library director who is responsible to a library board. The public library staff should project an image of competence and friendliness to all members of the public. Public library staff members should understand the service goals of the library, should be aware of all library policies, and should be well trained in the practices and procedures required by their individual positions. Library staff members should be afforded the opportunity to continue to expand their knowledge of communication skills, library practice, library technology, and community demographics through participation in workshops, conferences, and other continuing education activities. Libraries should meet the following standards relating to staffing:

**Yes    No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. The library has regular, paid, and properly qualified staff, appropriately trained to fulfill their particular job responsibilities.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. The library director is qualified for and maintains the appropriate level of certification under the provisions of the Wisconsin Administrative Code.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. The library board has adopted a set of personnel policies outlining the conditions and requirements for employment of library staff, and these policies are consistent with state and federal regulations, including the Fair Labor Standards Act, the Americans with Disabilities Act, and relevant court decisions. The board reviews the policies on a regular schedule and after any significant change in employment law. |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. The library has a written personnel classification plan describing the job duties of each staff member, any educational and experience requirements, the physical requirements of the job, and salary range. The plan ensures that all qualified individuals have an equal opportunity for employment.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. The library staff members have salaries, hours, and benefits determined by the library board and comparable with other community positions requiring similar educational preparation and job assignments.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. The library establishes and meets a service target for staffing in full-time equivalents (FTEs) per 1,000 population not lower than the Basic Level for its population group. System resource libraries and libraries with specialized collections or extended open hours or services may require additional staff. Regardless of population served, total library staff is not less than 1 FTE. (See Appendices A, B and C.)  |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. The library supports the library director's continuing education for at least 20 contact hours per year. (The Wisconsin Administrative Code requires that library directors participate in 100 hours of continuing education over the five year period prior to recertification.)  |

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 8. The library provides opportunities for each key employee (other than the director) for participation in at least ten (10) hours of continuing education activities each year. The opportunity is prorated for part-time employees; that is, an employee working 30 hours per week should have the opportunity for at least 7.5 hours of continuing education activities each year. |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. The library supports the staff's continuing education and professional activities, including paid work time for attendance, registration fees, and travel costs.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. The library allocates a portion of its budget to reimburse the costs of continuing education activities.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. The staff receives training in emergency procedures and protocols as recommended by the Department of Workforce Development and the Occupational Safety and Health Administration, especially regulations governing emergency evacuation, fire prevention plans, medical services and first aid, portable fire extinguishers, and alarm systems.                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. The library has local or system staff or outside assistance available to resolve technology problems in a timely manner so that there is minimal impact on library operations and services.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. The library has staff trained to assist patrons with the effective use of technologies, including assistive devices and adaptive software, to access and use the Internet and other electronic and non-print resources.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. All key library staff have e-mail accounts and ready access to a workstation with a dedicated Internet connection.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. The staff receives diversity and ability awareness training for communicating with library patrons and coworkers, including persons with physical and mental disabilities, those from diverse cultural backgrounds, adult new readers, and individuals with limited English-speaking ability.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 16. All library staff and volunteers are knowledgeable about the statutory protections of the confidentiality of patron use of library materials, electronic resources, and services.   |

## 5 Collection and Resources

The library should provide a wide range of materials and electronic resources in a variety of formats and in sufficient quantities to meet the needs of all members of its community. This chapter addresses acquisition and ownership of materials and the library's ability to provide additional materials through interlibrary resource sharing. This chapter also covers the availability of electronic resources whether or not they are physically located in the library. Chapter 7 is a complementary chapter, addressing access to library resources and services, including the technological tools needed to maximize access.

In addition to the standards in this chapter, a number of other measurements can help a library establish goals for collections and resources. For example, a high turnover rate reflects a heavily used collection and might suggest a need for a larger collection. See *Output Measures for Public Libraries* (Van House et al., 1987) for information about a number of service measurement tools.

Libraries should meet the following standards relating to library collection and resources:

**Yes    No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. The library has a collection and resource development policy based on community needs and the diversity of American society that encompasses selection; requests for reconsideration of materials; collection specialties and purchase priorities; and evaluation, especially in weeding the collection.               |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. The library allocates funds for purchasing materials in a variety of formats and for access to electronic resources, based on its collection and resource development policy.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. The library budgets sufficient funds to maintain, upgrade, and replace needed library equipment and software on a regular schedule.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. The library has a multi-year technology plan or participates in a library system plan that addresses library needs and the funding to meet those needs. This plan is reviewed annually.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. The library participates in the system-wide plan for technology and resource sharing.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. The library uses interlibrary loan to supplement, but not supplant, local collection development.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. The library cooperates in collection development with other local, area, and state-level libraries of all types, including the Wisconsin Regional Library for the Blind and Physically Handicapped, to provide a wide range of resources in a variety of formats to meet the needs of its community.                   |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. The library provides access to resources in a variety of formats to ensure equal access for persons of all ages with disabilities, in compliance with the Americans with Disabilities Act. Formats may include books on cassette and in Braille, electronic formats, and closed captioned, described, or signed video. |

**Yes** **No**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 9. The library provides access to adult basic-skills and English-as-a-Second-Language materials with reading levels and formats appropriate to meet the needs of patrons who are adult new readers, or who have developmental disabilities or limited English speaking skills.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. The library has, or provides access to, electronic information resources for its staff and its patrons. This may be accomplished through a variety of means, including: <ul style="list-style-type: none"><li>• online database searching</li><li>• CD-ROM databases</li><li>• digitized materials</li><li>• locally mounted databases</li><li>• remote full-text databases</li><li>• access to the Internet</li></ul> |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. The library provides web pages with organized web links pointing to useful and reliable local, regional, state, national, and international Internet resources. These web pages provide a prominent link to BadgerLink resources, clearly indicating that these resources are provided as a result of state funding of the BadgerLink program.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. The library includes its bibliographic and holdings information (in the accepted MARC format) in the statewide database (WISCAT) and maintains the accuracy of that data.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. The library provides adaptive technology to ensure access to electronic resources for persons with disabilities.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. The library collects and reports statistics related to the availability and use of materials and electronic resources as required on the DLTCL Public Library Annual Report form, using standard definitions supplied by the Division.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. The library establishes and meets a service target for print volumes held per capita not lower than the Basic Level for its population group. Regardless of population served, the minimum total volumes held is 8,000. (See Appendices A, B and C.)   |
| <input type="checkbox"/> | <input type="checkbox"/> | 16. The library establishes and meets a service target for periodical titles received per 1,000 population not lower than the Basic Level for its population group. Regardless of population served, the minimum number of periodical titles received is 30. (See Appendices A, B and C.)  |
| <input type="checkbox"/> | <input type="checkbox"/> | 17. The library establishes and meets a service target for audio recordings held per capita not lower than the Basic Level for its population group. Formats may include, among others, audiocassettes, compact disc recordings, and digital audio discs, players and services. (See Appendices A, B and C.)   |
| <input type="checkbox"/> | <input type="checkbox"/> | 18. The library establishes and meets a service target for video recordings held per capita not lower than the Basic Level for its population group. (See Appendices A, B and C.)  |

**Yes** **No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 19. The library establishes and meets a service target for total expenditures for material (including electronic resources) per capita not lower than the Basic Level for its population group. Regardless of population served, total minimum expenditures for materials (including electronic resources) is \$10,000. (See Appendices A, B and C.)  |
| <input type="checkbox"/> | <input type="checkbox"/> | 20. The library establishes and meets a service target for total collection size per capita (including print volumes and audio and video materials) not lower than the Basic Level for its population group. (See Appendices A, B and C.)   |
| <input type="checkbox"/> | <input type="checkbox"/> | 21. The library maintains a current collection of core reference materials and resources selected from recommended lists and also additional sources selected to meet the information needs of the library's patrons.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 22. Every item in the library's collection is evaluated for retention, replacement, or withdrawal at least every five years to determine its usefulness and accuracy according to the library's collection development policy. Outdated, unnecessary, or damaged materials are removed from the collection. The library establishes and attains a measurable annual weeding plan based on local conditions and the library mission. |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. The library catalogs and arranges its collections for easy accessibility and according to currently accepted library cataloging and classification practices.   |



## 6 Services

Through public services, a library offers assistance to patrons in the use of its collections and resources. The library also provides patrons with resources beyond those owned by the library through interlibrary loan and other resource-sharing arrangements. Basic public services include reference, information services and programming. These services should be provided to all age groups: children, young adults, and adults.

Libraries should meet the following standards relating to the development of services:

**Yes    No**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. The library maintains policies and/or procedures regarding the public services it provides, such as reference and information services, programming services, services to children and teens, and services to patrons with special needs. |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. The library cooperates with other types of libraries in the local area to plan for and provide services to all area residents.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. The library works with community agencies and organizations in the local area in planning and implementing services for all residents.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. The library participates in system-level planning for services to special needs populations and youth.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. The library ensures effective communication with persons with disabilities at all service points by providing staff with training, adaptive equipment and software, and by making materials available in alternative formats.             |

### Reference and Information Services

The core of reference and information services is: provision of information, guidance in choosing materials appropriate to a user's needs, and instruction in library use. Libraries should meet the following standards relating to reference and information services:

**Yes    No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 6. The library provides reference and readers' advisory services to residents of all ages and levels of literacy in person, by telephone, and by text telephone (TTY) or relay service the entire time it is open. Other means of providing reference service are also offered, if appropriate (e.g., fax, email or virtual reference). |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. The library provides reference and readers' advisory services to patrons with disabilities in formats they can utilize.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. The library provides staff trained in reference work, including reference work with children, during all hours the library is open.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. The library has staff trained to assist patrons (including people with disabilities) with the effective use of technologies necessary to access and use the Internet and other electronic and non-print resources.   |

**Yes    No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 10. The library participates in system-coordinated backup reference, interlibrary loan service, and delivery service to provide accurate and timely public service.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. The library annually computes reference transactions per capita and the reference completion rate as defined in <i>Output Measures for Public Libraries</i> . (Van House et al., 1987)  |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. The library makes available or has ready access to an accurate and up-to-date community information and resource file, including names of officers and contacts for community organizations and service agencies, providers of job and literacy training, and so forth. This file is made available on the Internet, if feasible. |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. The library supports patron training in the use of technologies necessary to access electronic resources, including training for persons with disabilities in the use of adaptive equipment and software.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. The library prepares bibliographies and other access guides and user aids to inform patrons of the availability of resources on a specific topic or issue, and makes them available in alternate formats, as appropriate.   |

## Programming

Educational, recreational, informational, and cultural programs sponsored by the library, or co-sponsored with other community organizations, are offered to help attract new users to the library, to welcome people from all cultures and people with disabilities, to increase awareness and use of library resources and services, and to provide a neutral public forum for the debate of issues. Programming is commonly held in the library, but outreach efforts may direct that some programs be held off-site. Libraries should meet the following standards relating to programming:

**Yes    No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Public programs provided by the library are free of charge [as required by <i>Wis. Stats.</i> s. 43.52(2)] and in physically accessible locations for children, teens, and adults. The library provides the necessary accommodations to enable persons with disabilities to participate in a program and advertises the availability of the accommodations in the program announcement. |
| <input type="checkbox"/> | <input type="checkbox"/> | 16. The library plans and evaluates programming for adults, young adults, and children, considering all of the following factors: <ul style="list-style-type: none"><li>• community demographics (age, ethnicity, education, and income levels)</li><li>• availability of programming from other organizations in the community</li><li>• local need and interest</li></ul>                 |

## 7 Access and Facilities

Access refers to making the library's services and resources as widely available as possible. It has many aspects: the library's location, the number of hours it is open, the efforts made by the library staff to extend services into the broader community, bibliographic access to the library's collections, and use of appropriate technologies to facilitate access to local and remote resources. The principle of equal access should be integral to the library's long-range plan.

The *physical* library facility also has a direct effect on access. All public library buildings should be easily accessible and offer a compelling invitation to the community. Library buildings should be flexible enough to respond to changing use and new technologies. Buildings should be expandable to accommodate growing collections and new services. Buildings should be designed for user efficiency. Building designs also should support staff efficiency, because staff costs are the major expense in library operation.

### Access to Information and Resources

Libraries should meet the following standards relating to access to information and resources:

Yes	No	
-----	----	--

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Library facilities are readily available to all residents of the service jurisdiction, within a 15-minute drive in metropolitan areas or a 30-minute drive in rural areas.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. The library provides signs on main community thoroughfares that indicate the direction to the library.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. The library takes action to reach all population groups in the community. Appropriate services may include homebound services; deposit collections for childcare facilities, schools, institutions, and agencies; books-by-mail service; bookmobile service; programs held outside the library; and remote access to the library online catalog and other resources. |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. The library ensures access to its resources and services for patrons with disabilities through the provision of assistive technology and alternative formats, in compliance with the Americans with Disabilities Act.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. As one measure of access, the library annually calculates its rate of registrations as a percentage of population as defined in <i>Output Measures for Public Libraries</i> . (Van House et al., 1987)   |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. The full range of services is available all hours the library is open.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Library hours are fixed and posted and include morning, afternoon, evening, and weekend hours. Hours open are based on an assessment of users' and potential users' most convenient days and times to visit the library, rather than on staff convenience.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. The library establishes and meets a service target for hours open not lower than the Basic Level for its population group. Regardless of population served, the library is open a minimum of 25 hours per week. (See Appendices A, B and C.)   |

Yes No

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 9. The library participates in a library system wide area network for shared services (e.g., shared integrated library system, Internet access).  |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. The library has a local area network (LAN) linking all workstations as appropriate. The library takes reasonable measures to insure the security of its LAN.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. The library has an integrated library system (ILS) or is part of a shared ILS with a graphical user interface.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. The library's catalog is available via the Internet with the use of a web browser and is accessible 24 hours per day, seven days per week.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. The library's online catalog and other electronic resources are accessible to persons with disabilities through the use of adaptive and assistive technology.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. The library has a dedicated high-speed connection to the Internet, which is available to multiple library workstations. Whenever possible the library provides public wireless Internet for access from private laptops and devices.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. The library has a telephone system adequate to meet public and staff needs including at least one text telephone (TTY). A voice mail system or answering machine provides basic library information to callers during times the library is not open, with a choice for languages other than English, as appropriate.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 16. The library authorizes and maintains (or jointly maintains) an up-to-date universally-accessible web page that includes library hours, phone numbers, services, and other basic information.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 17. The library has multiple listings, as appropriate, in the local telephone directory.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 18. To facilitate the delivery of information, the library has (or has convenient access to) a photocopier and a fax machine.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 19. The library has appropriate equipment to support access to information in various non-print formats in its collection (CD players, VCRs, DVD players, microform machines, among others).  |
| <input type="checkbox"/> | <input type="checkbox"/> | 20. The library provides a minimum of one public access workstations per thousand for service populations under 5000, or one workstation per 2000 for service populations over 5000; or a sufficient number of workstations to accommodate patrons with minimal wait times for access to the library's catalog, the Internet, and other electronic resources. (See Appendix F for definition of "public access workstation.") |
| <input type="checkbox"/> | <input type="checkbox"/> | 21. When remote access to electronic information resources is offered, it is available 24 hours a day, seven days per week.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 22. The library has converted its bibliographic and holdings information into machine-readable form using the MARC standard.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. If the library elects to filter Internet content, it has a policy and procedure in place to allow patrons unfiltered access to legitimate information.  |

## The Physical Facility

Libraries should meet the following standards relating to the physical facility:

Yes    No

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 24. The library provides adequate space to implement the full range of library services that are consistent with the library's long-range plan and the standards in this document.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 25. The library has allocated space for child and family use, with all materials readily available, and provides furniture and equipment designed for children and persons with disabilities.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 26. At least once every five years, and more frequently if needed, the board directs the preparation of an assessment of the library's long-term space needs.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 27. The library building and furnishings meet state and federal requirements for physical accessibility, including the <i>ADA Accessibility Guidelines for Buildings and Facilities (ADAAG)</i><br>(at <a href="http://www.access-board.gov/adaag/html/adaag.htm">http://www.access-board.gov/adaag/html/adaag.htm</a> ) |
| <input type="checkbox"/> | <input type="checkbox"/> | 28. In compliance with the <i>ADAAG</i> , the library provides directional signs and instructions for the use of the collection, the catalog, and other library services, in print, Braille, alternate formats, and languages other than English, as appropriate.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 29. The library's accessible features (such as entrance doors, restrooms, water, and parking spaces) display the International Symbol of Accessibility.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 30. The library building supports the implementation of current and future telecommunications and electronic information technologies.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 31. Adequate, safe, well-lighted, and convenient parking is available to the library's patrons and staff on or adjacent to the library's site. The minimum number of required parking spaces may be governed by local ordinance.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 32. The exterior of the library is well lighted and identified with signs clearly visible from the street.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 33. The entrance is clearly visible and is located on the side of the building that most users approach.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 34. Emergency facilities are provided in accordance with appropriate codes; evacuation routes, emergency exits, and the locations of fire extinguishers are clearly marked; emergency first aid supplies are readily available; and the library has a designated tornado shelter.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 35. Lighting levels comply with standards issued by the Illuminating Engineering Society of North America.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 36. The library provides facilities for the return of library materials when the library is closed; after-hours material depositories are fireproof and are accessible to people with disabilities.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 37. The library has accessible public meeting space available for its programming and for use by other community groups, if appropriate.   |



# Appendixes

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## ***Appendix A: Quantitative Standards by Municipal Population\****

### ***FTE Staff per 1,000 Population***

*Regardless of the population served, minimum total staff is 1.0 FTE*

	<b>Municipal Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	1.0	0.9	0.8	0.7	0.6	0.5	0.4
Moderate	1.2	1.0	0.9	0.8	0.7	0.6	0.5
Enhanced	1.5	1.2	1.1	0.9	0.8	0.7	0.6
Excellent	2.1	1.6	1.4	1.1	1.0	0.9	0.7

### ***Volumes Held per Capita (Print)***

*Regardless of the population served, the minimum total volumes held is 8,000 volumes*

	<b>Municipal Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	8.8	6.4	5.6	4.3	3.7	3.5	2.6
Moderate	11.3	7.9	6.1	4.9	3.9	3.7	3.4
Enhanced	14.7	9.3	6.9	5.6	4.3	4.2	4.1
Excellent	22.8	11.8	9.1	6.9	5.6	4.5	4.3

### ***Periodical Titles Received per 1,000 Population (Print)***

*Regardless of the population served, the minimum periodical titles received is 30 titles*

	<b>Municipal Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	30.2	21.0	16.4	11.4	7.1	6.7	3.6
Moderate	39.5	25.7	17.9	12.6	8.1	7.9	3.8
Enhanced	58.1	33.7	20.4	15.9	9.8	8.9	5.0
Excellent	92.6	42.8	24.7	17.6	11.1	10.5	10

### ***Audio Recordings Held per Capita***

	<b>Municipal Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	0.27	0.25	0.24	0.22	0.20	0.18	0.12
Moderate	0.39	0.33	0.32	0.28	0.24	0.22	0.15
Enhanced	0.53	0.52	0.40	0.36	0.28	0.26	0.21
Excellent	1.02	0.61	0.51	0.45	0.38	0.36	0.25

*\*“Municipal population” is the population of the city, town, village, or county establishing the library, or the total population of communities establishing a joint library.*

***Video Recordings Held per Capita*****Municipal Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	0.60	0.44	0.31	0.24	0.20	0.18	0.12
Moderate	0.85	0.56	0.41	0.33	0.25	0.23	0.15
Enhanced	1.10	0.70	0.48	0.38	0.29	0.27	0.20
Excellent	2.16	0.99	0.80	0.48	0.37	0.31	0.24

***Hours Open***

*Regardless of the population served, the minimum hours open is 25 hours per week*

**Municipal Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	25	44	56	58	60	63	67
Moderate	32	50	59	61	65	67	68
Enhanced	39	53	61	64	66	68	69
Excellent	48	58	64	67	68	70	70

***Materials Expenditures per Capita***

*Regardless of the population served, the minimum materials expenditures is \$10,000*

**Municipal Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	\$6.32	\$6.23	\$5.84	\$5.31	\$4.96	\$4.90	\$3.42
Moderate	\$8.93	\$8.62	\$7.16	\$5.76	\$5.37	\$5.37	\$3.85
Enhanced	\$10.43	\$9.76	\$8.05	\$7.06	\$6.45	\$6.41	\$4.39
Excellent	\$16.73	\$13.60	\$10.36	\$10.01	\$8.08	\$7.43	\$4.92

***Collection Size (Print, Audio & Video) per Capita*****Municipal Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	10.2	7.1	6.3	4.9	4.1	3.9	2.8
Moderate	12.6	8.7	6.8	5.6	4.4	4.3	3.8
Enhanced	17.0	10.3	7.8	6.4	5.0	4.8	4.5
Excellent	27.3	13.3	10.3	7.8	6.4	5.0	4.7

## ***Appendix B: Quantitative Standards by Service Population\****

### ***FTE Staff per 1,000 Population***

*Regardless of the population served, minimum total staff is 1.0 FTE*

	<b>Service Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	0.6	0.4	0.4	0.4	0.4	0.4	0.4
Moderate	0.7	0.5	0.5	0.5	0.5	0.5	0.5
Enhanced	0.8	0.7	0.6	0.6	0.6	0.6	0.6
Excellent	1.1	0.9	0.8	0.7	0.7	0.7	0.7

### ***Volumes Held per Capita (Print)***

*Regardless of the population served, the minimum total volumes held is 8,000 volumes*

	<b>Service Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	6.0	3.9	3.1	2.9	2.7	2.7	2.6
Moderate	7.3	4.7	3.9	3.4	3.0	2.8	2.7
Enhanced	9.7	5.8	4.6	4.0	3.5	3.4	2.9
Excellent	13.9	7.7	6.1	5.0	4.1	4.2	3.7

### ***Periodical Titles Received per 1,000 Population (Print)***

*Regardless of the population served, the minimum periodical titles received is 30 titles*

	<b>Service Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	15.4	12.8	11.1	8.2	5.4	4.5	3.7
Moderate	22.1	16.4	13.1	9.7	6.8	5.6	4.0
Enhanced	31.4	21.0	15.3	11.6	8.2	6.1	5.4
Excellent	45.1	27.8	18.5	13.2	9.5	8.5	8.2

### ***Audio Recordings Held per Capita***

	<b>Service Population</b>						
	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	0.14	0.13	0.13	0.13	0.17	0.17	0.11
Moderate	0.21	0.17	0.18	0.16	0.19	0.20	0.17
Enhanced	0.33	0.25	0.24	0.23	0.22	0.21	0.18
Excellent	0.49	0.38	0.34	0.32	0.30	0.28	0.21

*\*“Service Population” is the library's home community population plus an additional population determined from circulation statistics for county residents without a library.*

***Video Recordings Held per Capita*****Service Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	0.36	0.26	0.22	0.18	0.16	0.14	0.11
Moderate	0.50	0.37	0.28	0.22	0.20	0.18	0.15
Enhanced	0.71	0.46	0.38	0.28	0.25	0.23	0.19
Excellent	1.00	0.72	0.48	0.35	0.31	0.24	0.20

***Hours Open***

*Regardless of the population served, the minimum hours open is 25 hours per week*

**Service Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	25	34	46	56	59	64	67
Moderate	30	40	50	59	64	65	68
Enhanced	36	43	53	62	66	68	69
Excellent	39	51	58	65	68	70	72

***Materials Expenditures per Capita***

*Regardless of the population served, the minimum materials expenditures is \$10,000*

**Service Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	\$4.05	\$3.92	\$3.87	\$3.60	\$3.52	\$3.50	\$3.35
Moderate	\$5.83	\$5.25	\$4.95	\$4.50	\$4.35	\$4.30	\$4.22
Enhanced	\$6.46	\$5.35	\$5.20	\$5.05	\$4.95	\$4.85	\$4.30
Excellent	\$8.59	\$8.60	\$6.89	\$6.21	\$6.17	\$5.47	\$4.41

***Collection Size (Print, Audio & Video) per Capita*****Service Population**

	Less than 2,500	2,500 to 4,999	5,000 to 9,999	10,000 to 24,999	25,000 to 49,999	50,000 to 99,999	100,000 and over
Basic	6.5	4.5	3.4	3.3	3.1	3.0	2.9
Moderate	8.2	5.2	4.4	3.8	3.4	3.3	3.0
Enhanced	10.3	6.4	5.2	4.5	4.1	3.8	3.2
Excellent	14.9	8.6	6.7	5.5	4.8	4.6	4.1

## *Appendix C: Quantitative Standards Regardless of Community Size*

In addition to establishing per capita standards, the Public Library Standards Task Force also established a number of quantitative standards that apply regardless of community size. These standards are based on the judgment of the Public Library Standards Task Force that residents of any community need and deserve at least a basic level of library service.

The following standards apply regardless of community size:

- The library is open a minimum of 25 hours per week.
- A certified library director is paid to perform board-designated duties for no fewer than 25 hours per week.
- Minimum total library staff is 1 FTE.
- The library supports the library director's continuing education for at least 20 contact hours per year.
- Minimum total book volumes held is 8,000.
- Minimum print periodical titles received is 30.
- Minimum total annual local expenditures on collection (including electronic resources) is \$10,000.
- Minimum year 2005 total operating budget is \$60,000 (see below for more information).

### **Estimated Minimum Cost Components of Recommended Minimum Library Budget**

<b>Budget Item</b>	<b>Minimum Cost</b>
Director's salary	\$18,100 (salary for a Grade 3 Certified Director at a minimum of 25 hrs/wk)
Other staff wages	\$7,600 (for a minimum of 15 hrs/wk)
Social sec., benefits, etc.	\$8,300 (32% of salary costs)
Materials	\$10,000 (print, AV and electronic resources)
All other expenses	\$16,000 (supplies, utilities, technology costs, continuing education, etc.)
<b>Total operating costs</b>	<b>\$60,000</b> (in 2005)
(capital costs including debt retirement are not included in this figure)	
<b>Est. minimum for 2006</b>	\$61,500 (increase of 2.5%*)
<b>Est. minimum for 2007</b>	\$63,000 (increase of 2.5%*)
<b>Est. minimum for 2008</b>	\$64,600 (increase of 2.5%*)
<b>Est. minimum for 2009</b>	\$66,200 (increase of 2.5%*)
<b>Est. minimum for 2010</b>	\$67,900 (increase of 2.5%*)

\*Estimated annual increases of 2.5% represent the approximate average budget increase for Wisconsin libraries to cover inflationary increases, usage increases, and service improvements.



## ***Appendix D: Summary of Technology-Related Standards***

- The library participates in a library system wide area network for shared services (e.g., shared integrated library system, Internet access).
- The library has a local area network (LAN) linking all workstations as appropriate. The library takes reasonable measures to insure the security of its LAN.
- The library has a dedicated high-speed connection to the Internet, which is available to multiple library workstations. Whenever possible, the library provides public wireless Internet for access from private laptops and devices.
- If the library elects to filter Internet content, it has a policy and procedure in place to allow patrons unfiltered access to legitimate information.
- The library has an integrated library system (ILS) or is part of a shared ILS with a graphical user interface.
- The library's catalog is available via the Internet with the use of a web browser and is accessible 24 hours per day, seven days per week.
- The library provides a minimum of one public access workstations per thousand for service populations under 5000, or one workstation per 2000 for service populations over 5000; or a sufficient number of workstations to accommodate patrons with minimal wait times for access to the library's catalog, the Internet, and other electronic resources.
- The library authorizes and maintains (or jointly maintains) an up-to-date universally-accessible web page that includes library hours, phone numbers, services, and other basic information.
- The library provides web pages with organized web links pointing to useful and reliable local, regional, state, national, and international Internet resources. These web pages provide a prominent link to BadgerLink resources, clearly indicating that these resources are provided as a result of state funding of the BadgerLink program.
- When remote access to electronic information resources is offered, it is available 24 hours a day, seven days per week.
- All key library staff have e-mail accounts and ready access to a workstation with a dedicated Internet connection.
- The library has staff trained to assist patrons with the effective use of technologies, including assistive devices and adaptive software, to access and use the Internet and other electronic and non-print resources.
- The library has local or system staff or outside assistance available to resolve technology problems in a timely manner so that there is minimal impact on library operations and services.
- The library has a multi-year technology plan or participates in a library system plan that addresses library needs and the funding to meet those needs. This plan is reviewed annually
- The library budgets sufficient funds to maintain, upgrade, and replace needed library equipment and software on a regular schedule.



## ***Appendix E: Bibliography***

Citations marked with \* denote resources especially geared toward the smaller public library.

### **Generalities**

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## ***Appendix F: Definitions of Terms and Acronyms Used in the Standards***

**Acquisition.** The process of acquiring the library materials that make up the library's collection.

**ALA.** American Library Association, the national professional library organization.

**Automation.** All aspects involved in using a computer system for such tasks as circulation, cataloging, acquisitions, and interlibrary loans.

**Cataloging.** The process of describing an item in the collection and assigning a classification (call) number.

**Capital funds.** Funds for acquisition of or additions to fixed assets, such as building sites, new buildings and building additions, new equipment (including major computer installations), initial book stock, furnishings for new or expanded buildings, and new vehicles. This excludes replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. Note: Municipal accounting practices shall determine whether a specific item is a capital expense or an operating expense regardless of examples in the definitions. Expenditures for books, other than initial book stock, are not capital expenditures.

**CD-ROM.** Compact Disc, Read-Only Memory; a medium for storing data and multimedia information electronically.

**CE.** Continuing Education.

**Certified library director, librarian or library administrator.** These terms refer to a librarian maintaining proper certification from the DPI, as required by the Wisconsin Administrative Code, and as required by Chapter 43 for library membership in a public library system.

**Chapter 43.** The chapter of the *Wisconsin Statutes* governing the establishment and operation of public libraries and library systems.

**Circulation.** The act of loaning material from the library's collection for use outside the library. This activity includes checking out materials to users, either manually or electronically, and also renewing, each of which is reported as a circulation transaction. Interlibrary loan items provided to the library and checked out by the library should be counted as a circulation. Interlibrary loan items sent to, or checked out to, another library do not count as a circulation.

**COLAND.** Council on Library and Network Development; an advisory council on library services to DPI appointed by the governor and including library professionals and lay people.

**Collection.** The total accumulation of all library materials and electronic resources provided by a library for its clientele.

**Contact hour.** As defined in the *Wisconsin Public Librarian Certification Manual*, a contact hour is 60 minutes of continuous participation in an eligible continuing education activity.

**DLTCL.** Division for Libraries, Technology, and Community Learning, part of DPI.

**DPI.** Department of Public Instruction, State of Wisconsin.

**DVD.** Digital versatile disc; a medium for storing data and multimedia information electronically.

**FTE.** A standard measurement of staff size, full time equivalent is determined by summing the total hours worked per typical week by all library employees and dividing by forty.

**Goals.** Broad, long-term outcomes the community will receive as a desired result of specific services provided by the library to address identified strategic issues.

**Hours open.** For purposes of standards, the number of hours the main library building is open to the public during the winter.

**ILL or Interlibrary loan.** A transaction in which library material is loaned by one library to another outside its branch system for the use of an individual patron.

**ILS.** An Integrated Library System is a suite of library software for both public and library staff use consisting of modules to automate and coordinate common library operations such as circulation, catalog, serials, acquisitions, and ILL, with integrated Web content. In Wisconsin over 80% of the public libraries are part of a shared ILS often operated or coordinated by the library system

**Key Staff.** Library employees whose position or duties require that the public or other libraries be able to contact them individually.

**LAN.** A Local Area Network is a computer network linking workstations, file servers, printers, and other devices within a local area, such as an office. LANs allow the sharing of resources and the exchange of both video and data.

**MARC.** MACHine Readable Cataloging; the standard for bibliographic description encoded for computer processing.

**Municipal population.** The total number of persons who live inside the library's legal service jurisdiction, that is, the governmental unit(s) establishing the public library.

**Nonresident.** Nonresidents are library users who live outside the library's legal service jurisdiction, that is, the governmental unit(s) establishing the public library.

**Objectives.** In relation to planning, the means by which the library will measure its progress toward reaching a goal.

**Output measures.** Methods devised for measuring a library's performance, as determined by use of the library's resources and services.

**Periodical.** A publication with a distinctive title intended to appear in successive numbers or parts at stated or regular intervals and, as a rule, for an indefinite time; magazines and newspapers are periodicals.

**PLA.** The Public Library Association, a division of ALA (see above).

**Processing.** The carrying out of the various routines before material is ready for circulation, including cataloging and physical preparation.

**Public access workstation.** Any computer or terminal available exclusively for public use in the library.

**R&LL.** Reference and Loan Library.

**Resident.** A person who lives inside the library's legal service jurisdiction, that is, the governmental unit(s) establishing the public library.

**Selection.** The process of choosing the books and other materials to be bought by a library.

**Service population.** The municipal population (see above) plus an estimated value for an additional service area population.

**SLP.** Summer Library Program, an umbrella term for the children's activities and programs that a public library carries out during the summer.

**Stakeholder.** An individual or group who has an interest in and influences library activities, programs and objectives

**Subscriptions.** The arrangement by which, in return for a sum paid in advance, periodicals, newspapers, or other serials are provided for a specified number of issues. As used in the quantitative measures of the standards, these are print and microform subscriptions only, not electronic or digital subscriptions.

**SWOT Analysis:** A strategic planning tool used to evaluate the Strengths, Weaknesses, Opportunities, and Threats involved in a project or service. Strengths and weaknesses are internal to an organization while opportunities and threats originate from outside. A SWOT analysis, generally conducted early in the planning process, helps libraries evaluate outside factors and internal situations.

**Title.** A title is a publication that forms a separate bibliographic whole, whether issued in one or several volumes, reels, discs, slides, or parts. The term applies equally to printed materials, such as books and periodicals, and to audiovisual materials and microforms. Duplicate copies represent one title.

**Union catalog.** A consolidated catalog of holdings from several libraries.

**Volumes.** Volumes are the number of physical units or items in a collection. Items that are packaged together as a unit, e.g., two compact discs, two films, or two videocassettes, and are generally checked out as a unit, should be counted as one physical unit.

**WAN.** A Wide Area Network uses high-speed, long-distance communications technology to connect computers over long distances

**WAPL.** Wisconsin Association of Public Libraries; a division of WLA.

**Weeding.** The selection of library material from the collection to be discarded, sold or transferred to storage because of poor physical condition, outdated content, or limited popularity.

**WISCAT.** Wisconsin Catalog, the statewide database of holdings contributed by Wisconsin libraries of all types; currently available on the Web.

**Wisconsin Regional Library for the Blind and Physically Handicapped.** A federally funded library, located in Milwaukee, which provides books and periodicals on discs and audio cassettes and in Braille to blind and physically handicapped citizens of all ages throughout Wisconsin.

**WLA.** Wisconsin Library Association, the state professional library association.

**Workstation.** As used in the standards, any computer or computer terminal.